



PROJECT MANAGEMENT SOLUTIONS THAT *SIMPLY WORK* SINCE 1989.

UNIFIER & P6

MANAGING AND MERGING PROJECT & PROGRAM ESTIMATING AND FUNDING
USING UNIFIER

Kevin Hicks, PMC SCRUM
November 20, 2019

www.drmcnatty.com



Thank you for joining today's webinar

- Mute – all call in phones are automatically muted in order to preserve the quality of the audio for all attendees.
- Questions – during the session, questions can be submitted through the Questions Box on the right side of the screen . We will try to address your questions at the end of the presentation, time permitting.
- Follow up – all registrants will receive an Excel file listing all questions and responses along with a link to the recorded webinar.






Safe Harbor

- The statements made in this technical presentation are based on our current knowledge of the tools.
- Our statements should not be construed to be an official “Vendor perspective”, but are intended to be the sharing of technical and user knowledge gained as we explore new paths and technologies, usually in advance of our clients.
- You need to make your own judgments as to the application of our shared ideas in your own, unique environment.

Products and Services

- Project Controls System Implementation
- Cloud Based, Global Managed Hosting Services
- Software Training Services
- Integration, Analytics, Dashboards, Risk and Role-based User Access Tools
- Program and Project System Support Services and Partnering
- Mentored and Supported SB/DVBE Project Staffing Resources

Tool Matrix

Business Process	 ORACLE PRIMAVERA	 ARES PRISM	 Deltak ACUMEN	 ORACLE + aconex	 ProjectStatus
Portfolio Management	P6, Unifier			Aconex	View
Planning & Budgeting	Unifier	G2		Aconex	Collaborate
Estimating		Estimating		Aconex	
CPM Scheduling	P6	Scheduling	Fuse		Status
Cost Management & Reporting	P6, Unifier	G2	Fuse	Aconex	Collaborate
Document Management	Unifier	Prism Docs		Aconex	
Change Management	Unifier	G2		Aconex	
Engineering Forms	Unifier	G2		Aconex	
BIM/Schedule Integration				Aconex	
Risk Analysis	P6 Risk		Risk		Collaborate
Risk Management & Mitigation	P6		Risk	Aconex	Collaborate
Role Based Cloud Dashboard	Dashboard	Dashboard		Aconex	View
Earned Value	P6	Earned Value		Aconex	
Claims Support & Analysis	P6		Fuse	Aconex	
Facility Management/Work Orders	Unifier			Aconex	
Mobile online/offline support	Mobile			Aconex	Browser
Integration with Finance/ERP	Gateway	Integrator		Aconex	Gateway

DRMcNatty supports these project controls tools as an authorized partner, trainer and implementer as well as providing trained and supported project staffing resources.

Abstract

For organizations that need to manage an entire program or manage the project estimating and budget process, Unifier has tools that can satisfy these requirements. You may be starting, fresh or migrating from an existing Project Controls system, Unifier provides robust tools to manage an entire program or individual projects. In this webinar, we'll illustrate some options for managing an overall program through comparing and merging project estimates with budgets, and the funding process. Each of these processes can be managed through a workflow routing design, helping you make informed and timely decisions. Leveraging Unifier reporting and dashboards will help to give a complete picture.

Agenda

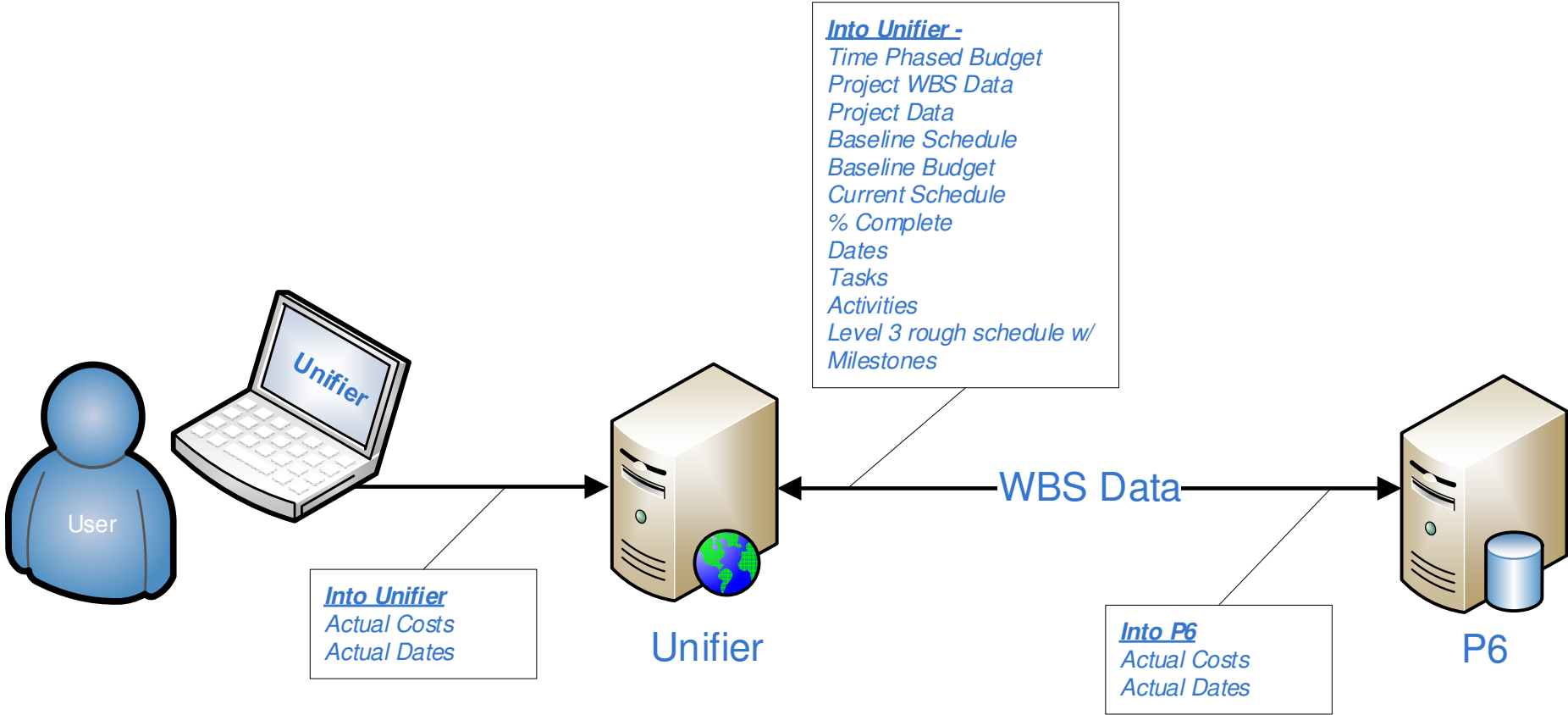
- Overview of Unifier
- Construction Projects, EPC, EPCM, CIP, in P6 & Primavera Unifier

Topics:

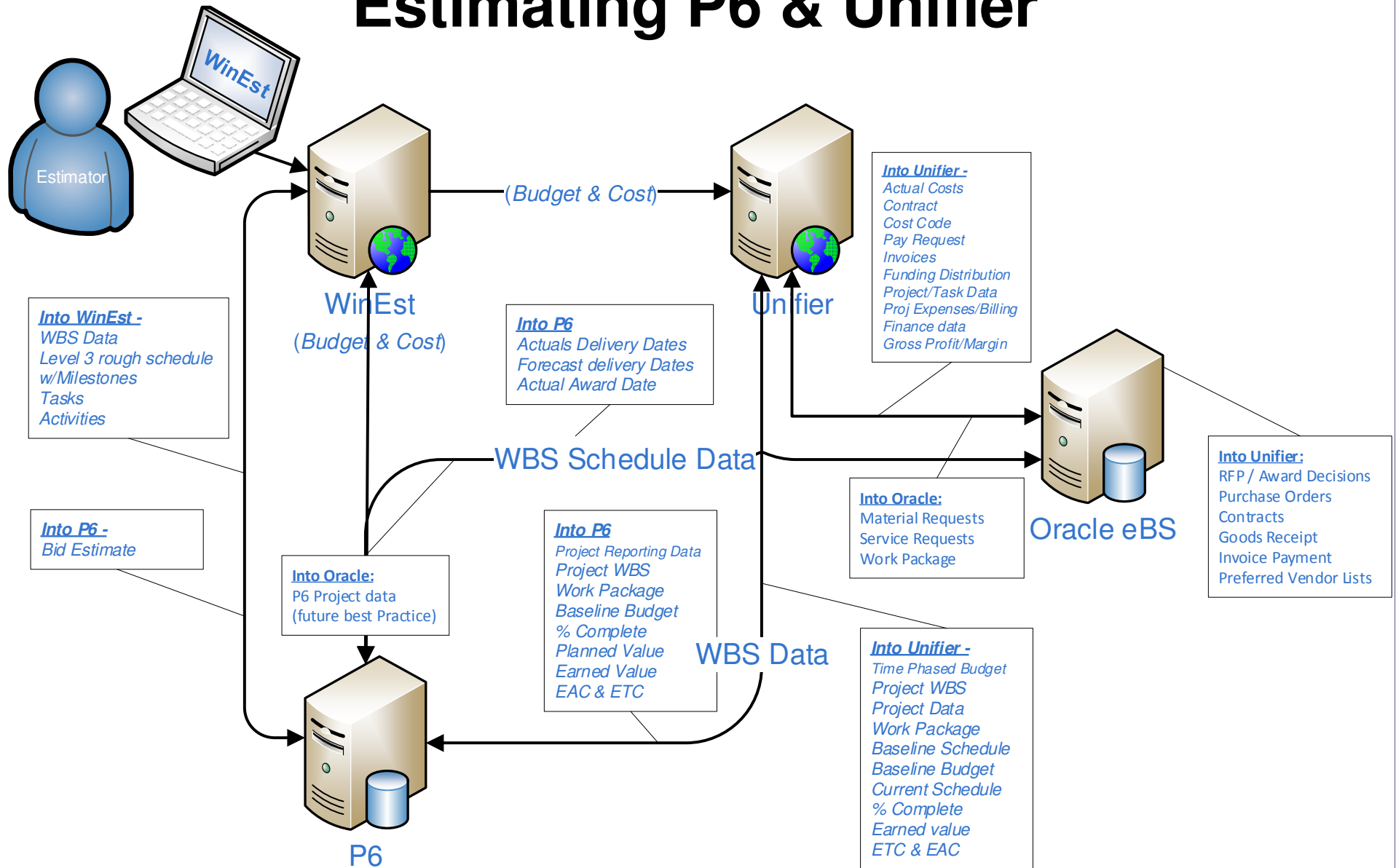
- Unifier & P6
- Demo
- Fund Sheet

- Demo
- Gateway Unifier & P6
- Unifier Activity Sheet
- Unifier Cost Sheet
- UDR Reports
- Follow-up/Recap
- Question and Comments

Unifier and P6



Estimating P6 & Unifier



P6 to Unifier

ORACLE PRIMAVERA P6 EPPM

Dashboards ▾ Portfolios ▾ **Projects ▾** Resources Approvals Reports Administration

EPS **Activities** Workspace Team Usage Assignments Issues Documents Risks

Activities of Lonesdale Place

Schedule... **Actions ▾** Views Default View

ID/Code *	CBS	Start	Finish	Remaining Duration	Activity % Complete
◆ 07100	07 07900 V.1.1	30-Jun-17 05:00 PM A	30-Jun-17 05:00 PM A	0.0d	100%
■ 07060	07 07900 V.1.1	30-Dec-16 12:00 AM A	30-Jun-17 05:00 PM A	0.0d	100%
◆ 07050		09-Nov-16 12:00 AM A	09-Nov-16 12:00 AM A	0.0d	100%
◆ 07010		31-Mar-16 08:00 AM A	31-Mar-16 08:00 AM A	0.0d	100%
■ 07030		31-Mar-16 12:00 AM A	09-Nov-16 12:00 AM A	0.0d	100%
◆ 07040		09-Nov-16 12:00 AM A	09-Nov-16 12:00 AM A	0.0d	100%

Exchange Data

- Import CBS Codes
- Send to Primavera Unifier
- Send to Schedule Sheet

Unifier Schedule Sheet From P6

ORACLE PRIMA

Save Add Delete Indent Outdent Gantt Progress Columns Find Zoom In Zoom Out Focus Close

CIP Projects

Lonesdale P6 Schedule

Id	Activity Name	P6 Activity Number	Start date	Finish date	Actual Start Date	Actual Finish Date	Activity Per...	Duration
1	Procurement for Construction		04/20/2015	01/18/2016				274
2	Bid Opening (C)	06030	09/29/2015	09/30/2015	09/29/2015	09/30/2015	0	2
3	BOCC Award (C)	06070	12/16/2015	12/16/2015	12/16/2015	12/16/2015	0	1
4	Bid Advertisement (C)	06020	08/21/2015	09/28/2015	08/21/2015	09/28/2015	0	27
5	Contract Preparation	06010	04/20/2015	07/03/2015	04/20/2015	07/05/2015	0	55
6	Bid Evaluation	06040	10/01/2015	10/16/2015	10/01/2015	10/16/2015	0	12
7	Bid Selection	06050	10/19/2015	10/20/2015	10/19/2015	10/20/2015	0	2
8	Prepare Bid for Agenda Item	06060	10/21/2015	12/01/2015	10/20/2015	11/30/2015	0	30
9	Contract Agreements	06080	12/17/2015	01/18/2016	12/16/2015	01/15/2016	0	23
10	Construction		03/31/2016	07/03/2017				460
11	Final Acceptance	07100	07/03/2017	07/03/2017	06/30/2017	06/30/2017	0	1
12	Construction_Final	07060	12/30/2016	06/30/2017	12/30/2016	06/30/2017	0	131
13	BOCC Date (30-Jun-17)	07050	11/14/2016	11/14/2016	11/09/2016	11/09/2016	0	1
14	NTP for Construction	07010	03/31/2016	03/31/2016	03/31/2016	03/31/2016	0	1
15	Construction_Main	07030	04/01/2016	11/10/2016	03/31/2016	11/09/2016	0	160
16	Substantial Completion	07040	11/11/2016	11/11/2016	11/09/2016	11/09/2016	0	1
17	Admin Closeout		07/04/2017	10/01/2018				455
18	Transfer to User Agency	08020	07/04/2017	11/06/2017	07/01/2017	11/04/2017	0	90
19	Fiscal Closeout Form Approved	08050	10/01/2018	10/01/2018			0	0

Lonesdale Place - Home
 Alerts
 Mailbox
 Task Manager
 Information
 Document Manager
 Financial Transactions
 Change Management
 Financial Reporting
 Submittal Manager
 RFI Manager
 Schedule Manager
Schedule Sheets
 Activity Sheet
 P6 Summary Sheets
 Communication & Fo...
 Ongoing Reporting
 Project Closeout
 Reports

P6 & Unifier CBS(WBS)

ORACLE PRIMAVERA P6 EPPM

Dashboards ▾ Portfolios ▾ **Projects ▾** Resources Approvals Reports Administration

EPS **Activities** Workspace Team Usage Assignments Issues Documents Risks

Activities of Lonesdale Place

Schedule... Actions ▾ Views Default View [Grid] [List] [Gantt] [Filter] [Refresh] [Print] [Close] [Search]

ID/Code *	Name *		CBS	Start	Finish	Remaining Duration	Activity % Complete
06050	Bid Selection	🔍	06 06100 S.1.1	19-Oct-15 12:00 AM A	20-Oct-15 12:00 AM A	0.0d	100%
06060	Prepare Bid for Agenda Item	🔍	06 06100 S.1.1	20-Oct-15 12:00 AM A	30-Nov-15 08:00 AM A	0.0d	100%
06080	Contract Agreements	🔍	06 06100 S.1.1	16-Dec-15 12:00 AM A	15-Jan-16 12:00 AM A	0.0d	100%
06030	Bid Opening (C)	🔍	06 06100 S.1.1	29-Sep-15 12:00 AM A	30-Sep-15 05:00 PM A	0.0d	100%
06070	BOCC Award (C)	🔍	06 06100 S.1.1	16-Dec-15 12:00 AM A	16-Dec-15 12:00 AM A	0.0d	100%
06020	Bid Advertisement (C)	🔍	06 06100 S.1.1	21-Aug-15 12:00 AM A	28-Sep-15 12:00 AM A	0.0d	100%
06010	Contract Preparation	🔍	01 01750 O.1.1	20-Apr-15 12:00 AM A	05-Jul-15 05:00 PM A	0.0d	100%
07	Construction						

Download

General Assignments Codes Discussion Documents **Expenses** Issues Notebooks Relationships Risks Status Steps Update History Trac

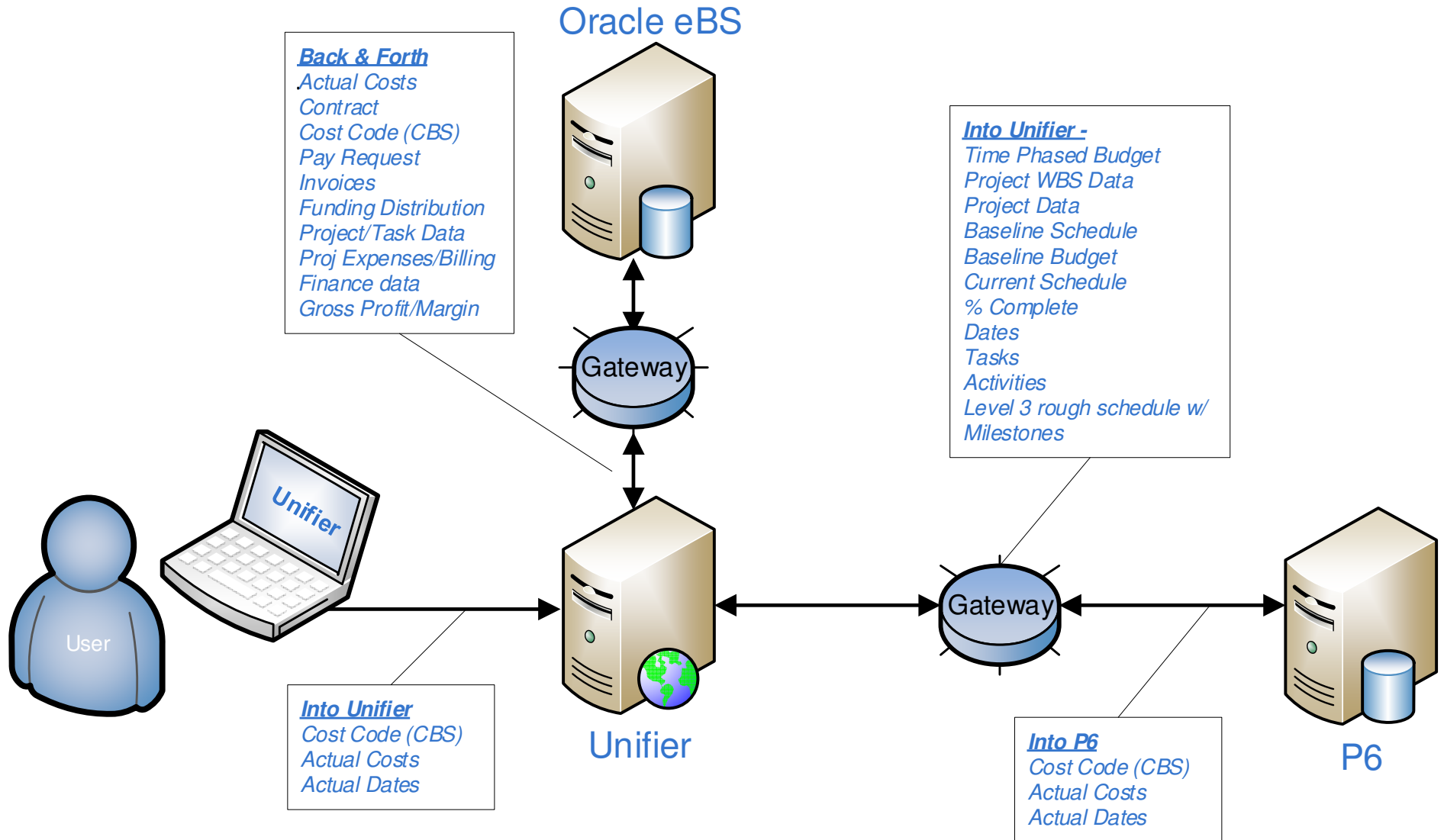
+ Add [Close] [Search]

CBS	Expense Item *	Planned Cost *	Actual Cost	Expense Category	Planned Units *	Actual Units	R
06 06100 S.1.1	Labor Lumpsum	1,000	1,000	CIT III	1.00	1.00	

System Demo

- Gateway Unifier & P6
- Demo
- Unifier Activity Sheet
- Estimates to Activities
- Unifier Cost Sheet
- Follow-ups
- Question and Comments

Unifier & P6 through Gateway



Unifier & P6 through Gateway

- ☰
- Data Dictionary ⊕
- Flow Type ⊕
- Synchronizations**
- Monitoring
- Configuration

Synchronizations

Filter All Synchronizations by Type Value All +Add... Edit... Run Actions ↕ ↻ 🔍

Synchronization Name	Business Flow	Description
Create P6 EPS in Prime as EPS code	Create EPS Code in Prime	
Create project header - P6 to Prime	Create project header - P6 to Prime	
Create project header- Prime to P6	Create project header- Prime to P6	
Create Workspace structure in P6 as Prime Wo...	Create Workspace Code in P6	
Get Activity data from P6	Get Activity data from P6	The flow sends activity sheet information from P6 to unifier and sync P6 and Unifier projects.
Lim Test	Get Activity data from P6	
Lim Test2	Master Data Flow	
Run P6 Export Project Data Flow for create event	P6 Export Project Data Flow for Eventing	
Run P6 Export Project Data Flow for update event	P6 Export Project Data Flow for Eventing	
Sample Import Project Synchronization	Sample Import Project Data Flow	
Send Activity data to P6	Send Activity data to P6	The flow sends activity data from Unifier to P6.
Send Approved Budget & Plan dates from Prim...	Send Approved Budget & Plan dates fr...	
Send P6 project data to Prime	Send P6 project data to Prime	
Send P6 project data to Prime for Risks	Send P6 project data to Prime for Risks	
Send P6 project data to Prime for Schedule	Send P6 project data to Prime for Sch...	
Send P6 project data to Prime for Scope	Send P6 project data to Prime for Scope	
Send P6 Resources and Roles to Prime	Send Resources and Roles to Prime	
Send P6 Resources to Prime	Send Resources to Prime	
Send P6 Roles to Prime	Send Roles to Prime	
Send Planned Budget & Plan dates from P6 to ...	Send Planned Budget & Plan dates fr...	
Send Prime project data to P6	Send Prime project data to P6	
Send Project Actual Cost & progress from P6 to...	Send Project Actual Cost & progress f...	
Send Proposed Budget & Plan dates from Prim...	Send Proposed Budget & Plan dates f...	
Send to Primavera Unifier	Send to Primavera Unifier	The flow sends CBS data (duration summary, expense spread, resource spread) and WB...
Update from Primavera Unifier	Update from Primavera Unifier	The flow sends CBS code data from Unifier to P6.

Unifier & P6 through Gateway

The screenshot shows the Oracle Primavera P6 EPPM interface. The top navigation bar includes 'Dashboards', 'Portfolios', 'Projects', 'Resources', 'Approvals', 'Reports', and 'Administration'. The 'Projects' menu is active, and the 'Activities' sub-menu is selected. The main content area is titled 'Activities of Lonesdale Place'. A table displays activity data with columns for 'ID/Code', 'CBS', 'Start', and 'Finish'. The 'Actions' menu is open, and 'Exchange Data' is highlighted, with a sub-menu showing 'Send to Primavera Unifier'.

ID/Code *	CBS	Start	Finish
07100	07 07900 V.1.1	30-Jun-17 05:00 PM A	30-Jun-17 05:00 PM A
07060	07 07900 V.1.1	30-Dec-16 12:00 AM A	30-Jun-17 05:00 PM A
07050		09-Nov-16 12:00 AM A	09-Nov-16 12:00 AM A
07010		31-Mar-16 08:00 AM A	31-Mar-16 08:00 AM A
07030		31-Mar-16 12:00 AM A	09-Nov-16 12:00 AM A
07040		09-Nov-16 12:00 AM A	09-Nov-16 12:00 AM A

Unifier & P6 through Gateway

Send to Primavera Unifier ✕

Select data to send to Unifier Summary sheet or Activity Sheet

Summary Sheet

Summary and Spread Data

WBS Hierarchy

Activity Sheet

Activity Data

Project ID	Project Name	Data Date	Schedule Type	Baselines
46132023	Lonesdale Place	31-Jul-18 11:59 PM	Cost Loaded	⋮

CancelSend

P6 Activity Data

ORACLE PRIM

File Edit View

Columns Find: Close Window

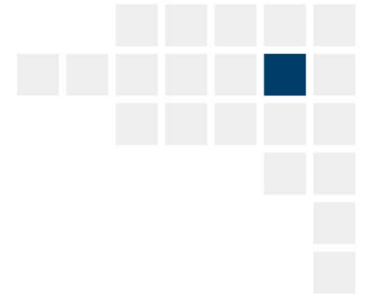
Lonsdale Place

Activity ID	Activity Name	Activity Status	Activity Type	Actual Duration	Actual Finish	Actual Start
03010	NTP for Design (DRMP)	Completed	Start Milestone	0.00	10/15/2013	10/15/2013
03040	60% Design	Completed	Task Dependent	960.00	01/28/2014	10/01/2013
03050	60% Design Review	Completed	Task Dependent	152.00	02/18/2014	01/31/2014
03060	90% Design	Completed	Task Dependent	240.00	03/14/2014	02/13/2014
03070	90% Design Review	Completed	Task Dependent	120.00	03/29/2014	03/15/2014
03080	Final Design	Completed	Task Dependent	1,056.00	08/08/2014	03/30/2014
03090	Final Design Review	Completed	Task Dependent	1,422.00	02/01/2015	08/08/2014
06010	Contract Preparation	Completed	Task Dependent	616.00	07/05/2015	04/20/2015
06020	Bid Advertisement (C)	Completed	Task Dependent	304.00	09/28/2015	08/21/2015
06030	Bid Opening (C)	Completed	Task Dependent	16.00	09/30/2015	09/29/2015
06040	Bid Evaluation	Completed	Task Dependent	128.00	10/16/2015	10/01/2015
06050	Bid Selection	Completed	Task Dependent	8.00	10/20/2015	10/19/2015
06060	Prepare Bid for Agenda...	Completed	Task Dependent	328.00	11/30/2015	10/20/2015
06070	BOCC Award (C)	Completed	Finish Milestone	0.00	12/16/2015	12/16/2015
06080	Contract Agreements	Completed	Task Dependent	296.00	01/20/2016	12/14/2015
07010	NTP for Construction	Completed	Start Milestone	0.00	03/31/2016	03/31/2016
07030	Construction, Main	Completed	Task Dependent	1,784.00	11/09/2016	03/31/2016
07040	Substantial Completion	Completed	Finish Milestone	0.00	11/09/2016	11/09/2016
07050	BOCC Date (30-Jun-17)	Completed	Finish Milestone	0.00	11/09/2016	11/09/2016
07060	Construction, Final	Completed	Task Dependent	1,464.00	06/30/2017	12/30/2016
07100	Final Acceptance	Completed	Finish Milestone	0.00	06/30/2017	06/30/2017
08020	Transfer to User Agency	Completed	Task Dependent	1,112.00	11/22/2017	07/06/2017

Re-Cap

- Fund Sheet
- P6 Data Linked to Unifier Activity Sheet
- “P6-Estimated” Activities Related to (CBS) WBS – in Unifier Activity Sheet
- Unifier Cost Sheet
- UDR Reports

Questions & Comments



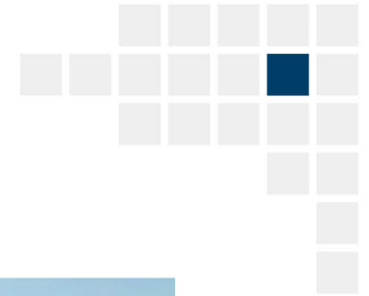
- All questions are gathered into a master sheet, answered and distributed to all registrants as well as posted on our website.
- Answers are based on our own experiences using the various software products covered in this webinar.

Thank you for participating

Contact - contact@drmcnatty.com



Upcoming Events



59th Annual
**WESTERN WINTER
WORKSHOP**

February 27 - March 1, 2020
Renaissance Indian Wells Resort & Spa



DRMcNatty Monthly e-newsletter

the
Loop

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